Individual Tax Checklist

Financial Year 20____ / ____

CLIENT NAME

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Income — tick what applies

- ☐ PAYG income (as employee)
- ☐ Interest (all bank accounts)
- ☐ Dividends
- ☐ Managed funds
- ☐ Australian Government payments
- ☐ Employee share scheme
- ☐ Cryptocurrency transactions (buy, sell, staking or earning)
- ☐ Capital gains (sale of shares, crypto or property)
- ☐ Other income (please specify)

Deductions — tick what you have

- ☐ Motor vehicle expenses (fuel, rego, repairs)
- ☐ Travel expenses (car, accommodation, meals)
- ☐ Uniforms & protective clothing
- ☐ Tools & equipment
- ☐ Home office expenses
- ☐ Self-education, courses & seminars
- ☐ Subscriptions, union & membership fees
- ☐ Computer, phone & internet
- ☐ Stationery & postage
- ☐ Bank charges & fees
- ☐ Interest on investment loans
- ☐ Insurance (income protection, PI)
- ☐ Gifts & donations
- ☐ Tax preparation fee
- ☐ Licences & registrations
- ☐ Office equipment (printer, laptop, tablet)
- ☐ Personal superannuation contributions (if claiming a deduction)
- ☐ Overtime meal allowances

Please keep all receipts and statements for at least five years, as required by the ATO.